



Filing ID #10026477

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Hon. Derek Kilmer
Status: Member
State/District: WA06

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2018
Filing Date: 07/12/2019

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank of America Checking [BA]	JT	\$1 - \$1,000	None		<input type="checkbox"/>
Bridge Builder Core Bond [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Purchase					
Bridge Builder Core Bond [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Purchase					
Bridge Builder Core Plus Bond [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: purchase					
Bridge Builder Core Plus Bond [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Purchase					
Bridge Builder Core Plus Bond Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: purchase					
Bridge Builder INTL Equity [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bridge Builder INTL Equity [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Purchase					
Bridge Builder Large Growth [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Purchase					
Bridge Builder Large Growth [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Bridge Builder Large Value [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Purchase					
Bridge Builder Large Value [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Purchase					
Bridge Builder Smallmid Growth [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Purchase					
Bridge Builder Smallmid Growth [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Bridge Builder Smallmid Value [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Purchase					
Bridge Builder SMallmid Value [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Capital Income Builder Fund Cl A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Capital Income Builder Fund CL A [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Clgam 529 College 2024A [5P]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	<input checked="" type="checkbox"/>
LOCATION: WA DESCRIPTION: PURchase					
Clgam 529 College 2027A [5P]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	<input checked="" type="checkbox"/>
LOCATION: WA DESCRIPTION: Purchase					
Edward Jones ⇒ GS FINL Square Govt Fd Instl [BA]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Edward Jones Insured Bank Money Market [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Edward Jones Retirement Money Market [BA]		\$1 - \$1,000	Interest	None	<input type="checkbox"/>
Edward Jones Retirment Money Market [BA]	SP	\$1 - \$1,000	Interest	None	<input type="checkbox"/>
GS FINL Square Govt Fd Instl [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Hotchkis & Wiley Funds High Yield Fund Cl I [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Hotchkis & Wiley High-Yield [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Purchase					
iShares MSCI EAFE Small Cap Et [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Purchase					
iShares MSCI EAFE SMLl Cap Et [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Purchase					
iShares Rus Mid Cap ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Purchase					
iShares Russ 1000 Fund [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: sale					
iShares Russ 2000 Fund [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Purchase					
iShares Russell 1000 Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: sale					
iShares Russell 2000 Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Purchase					
iShares Russell Midcap Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Purchase					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Kitsap Bank Checking [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
McKinsey & Co. Profit Sharing Retirement Plan and Money Purchase Pension Plan [PE]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Vanguard FTSE Dev Mkts ETF [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: sale					
Vanguard FTSE Developed Markets ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: sale					
Vanguard Index TR Vanguard Value ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Purchase					
Vanguard Index TR Vanguard Value ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Purchase					
WA State PERS Plan 2 [DB]	SP	\$50,001 - \$100,000	None		<input type="checkbox"/>
WA STate PERS Plan 2 [DB]		\$15,001 - \$50,000	None		<input type="checkbox"/>

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Bridge Builder Core Bond Fund [MF]	SP	05/23/2018	P	\$1,001 - \$15,000	
Bridge Builder Core Bond Fund [MF]		05/23/2018	P	\$1,001 - \$15,000	
Bridge Builder Core Plus Bond Fund [MF]	SP	05/23/2018	P	\$1,001 - \$15,000	
Bridge Builder Core Plus Bond Fund [MF]		05/23/2018	P	\$1,001 - \$15,000	
Clgam 529 College 2024A [5P]	DC	11/5/2018	P	\$1,001 - \$15,000	
LOCATION: WA					
DESCRIPTION: Dependent Child 1					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Clgam 529 College 2027A [5P] LOCATION: WA DESCRIPTION: Dependent Child 2	DC	11/5/2018	P	\$1,001 - \$15,000	
IShares Core US Aggregate Bond ETF [MF]	SP	05/23/2018	S	\$15,001 - \$50,000	<input type="checkbox"/>
IShares Core US Aggregate Bond ETF [MF]		05/23/2018	S	\$1,001 - \$15,000	<input type="checkbox"/>
IShares MSCI EAFE Small Cap FD [MF]	SP	05/23/2018	P	\$1,001 - \$15,000	
IShares MSCI EAFE Small Cap FD [MF]		05/23/2018	P	\$1,001 - \$15,000	
IShares Russell 1000 Fund [MF]	SP	05/23/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IShares Russell 1000 Fund [MF]		05/23/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IShares Trust S&P 100 Fund [MF]	SP	05/23/2018	S	\$1,001 - \$15,000	<input type="checkbox"/>
IShares Trust S&P 100 Fund [MF]		05/23/2018	S	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard FTSE Developed Markets ETF [MF]	SP	05/23/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard FTSE Developed Markets ETF [EF]		05/23/2018	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard Index TR Vanguard Value ETF [MF]	SP	05/23/2018	P	\$15,001 - \$50,000	
Vanguard Index TR Vanguard Value ETF [EF]		05/23/2018	P	\$1,001 - \$15,000	

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
State of Washington	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Bank of America	Revolving	Credit card	\$15,001 - \$50,000
JT	US Bank	January 2016	Mortgage on residence	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Trustee	Princeton University

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2005	State of Washington	Public Employees Retirement System Plan 2

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Princeton University	01/19/2018	01/20/2018	Washington, DC - Princeton, NJ - Seattle, WA	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Princeton University	06/3/2018	06/5/2018	Seattle, WA - Princeton, NJ - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Princeton University	11/16/2018	11/17/2018	Washington, DC - Princeton, NJ - Seattle, WA	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
British Embassy	02/16/2018	02/21/2018	Washington, DC - London, UK - Seattle, WA	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Princeton University	04/13/2018	04/15/2018	Washington, DC - Princeton, NJ - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Princeton University	09/20/2018	09/25/2018	Seattle, WA - Princeton, NJ - Washington, DC	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- o Edward Jones

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Hon. Derek Kilmer , 07/12/2019